



Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

Record of the Journey

Documentation of Portfolio Results for Experienced Service Coordinators

Name of participant	
Program affiliation (including district)	
Address	
Phone number (with area code)	E-mail address
Signature(s), affiliation, address, phone number	, and e-mail address of person(s) documenting results:
Date completed and approved	

Module 6

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Assignment/Activity	Measure of Achievement	Date Assigned	Date Successfully Completed	Comments
Module Description Note that the contents of this module are divided into three components: (1) Gathering				
Information, (2) Intake & Referral, and (3) Building Resources.				
6.1 Gathering Information	Active participation in			
View PowerPoint <i>Gathering Information</i> (slides 1-13), engaging in discussion as	discussion and activities during			
directed.	PowerPoint as led by the trainer.			
6.2 Routines-Based Interview	Independent outside			
The routines-based interview is a powerful component in the process of intervention	assignment. Review of			
planning. If your district/agency chooses to	materials as			

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incorporate this into practice, the trainer will complete the three activities presented here during formal training with the learner(s). Since this will add significant additional time necessary to complete this module, the trainer may choose to complete these activities at a separate training date and time. There are associated practices tied to the routines-based interview that are not included in this brief activity. To ensure understanding of this model, the trainer may consider the following:	requested and placement in portfolio.			
Training and technical assistance For keynote presentations, conference sessions, workshops, or site-specific technical assistance, contact Robin McWilliam Robin.McWilliam@Vanderbilt.edu In addition to Dr. McWilliam, an international network of colleagues, former students and staff, trainers, faculty, and program directors that have experience with Dr. McWilliam's model are available.				
Service coordinators benefit from learning about the routines-based interview. All participants should complete the following activities independently outside of formal				

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training time for this module, if they are not included in formal training as described above.				
Step 1 Review the content from the article, Functional Intervention Planning: The Routines-Based Interview (6.2a).				
Step 2 View the video to observe Dr. Robin McWilliam as he demonstrates this activity. Video—Routines-Based Interview (RBI) 45-minute video example of an interview for developing an IFSP with a family.				
Step 3 Review 6.2b Routines-Based Interview Form. Place the above article and form in the portfolio guide after review.				
If this step is completed during formal training, role-play with the trainer a brief interview, using the interview form for recording information, and place in				

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portfolio guide.				
6.3 Gathering Information Pre-Quiz	Pre-quiz			
	completion.			
Complete the pre-quiz. Give to trainer upon completion.				
6.4 Case example—Jack	Active			
	participation in			
View PowerPoint Gathering Information	discussion and			
(slides 14-16).	activities during			
Davidon a list of averations that might be used	PowerPoint as			
Develop a list of questions that might be used during the conversation with Susan and Gayle	led by the trainer.			
at the initial meeting.	tialitei.			
at the initial meeting.	Satisfactory			
Record your questions on worksheet 6.4a,	listing of			
and place in portfolio upon completion.	interview			
	questions on			
	worksheet 6.4,			
View slides 17-24. Participate as directed by	as determined			
the trainer.	by the trainer.			
	Worksheet			
	placed in			
6.5 Ask Mrs. Yonkers	portfolio. Active			
U.J ASK IVIIS. I UIIKEIS	participation			
View slides 25-28 of the PowerPoint, reading	and completion			
the questions posed. Indicate whether you	of activity as			
feel the question is important to ask Mrs.	directed by the			

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Yonkers.	trainer.			
After the participant(a) make their decision, go				
After the participant(s) make their decision, go to slides 29-38 to find out what Mrs. Yonkers				
thinks.				
6.6 Gathering Information Post-Quiz	Improved score			
	on post-quiz			
Complete the post-quiz. Compare your	compared to			
results to your own pre-quiz, and file both in	score on pre-			
the portfolio. 6.7 Intake & Referral Pre-Test	quiz. Completion of			
0.7 IIIIake & Neiellai Fle-Test	pre-test.			
Complete the pre-test.	pro toot.			
6.8 Intake & Referral	Active			
	participation in			
View PowerPoint Intake and Referral (slides	brief discussion			
1-17), engaging in brief discussion as	as directed by			<u> </u>
advised.	the trainer. Active			
6.9 Describing Tennessee's Early Intervention System	participation in			
intervention dystem	activity to the			
Using the intake flipchart Tennessee's Early	satisfaction of			
Intervention System, work in pairs as	the trainer.			
instructed. One person will play the role of				
the family member and the other person will	*Experienced			
play the role of the service coordinator.	TEIS service			
Practice presenting the information as you	coordinators in			
would to a family. Switch roles if time allows.	the Southeast			

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	District may exempt this activity as they have piloted and used this tool in everyday practice.			
Read the three checklists outside of training. Follow-up with the trainer or appropriate person in your office, if you have questions about these procedures. Think about what you have learned from doing intakes over the years, which might benefit a new service coordinator. Write a brief paragraph describing organizational tips and/or strategies you have used to improve and make more efficient the intake process for you and for families. Place a copy of the paragraph in the portfolio.	Follow-up with trainer or other appropriate person in the office for resolution of any questions as needed. Satisfactorily written paragraph verified by the trainer, and included in the portfolio.			
Your district office/agency may choose to compile these tips for new service coordinators for their review. Tips for locating				

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seemingly nonexistent addresses, ways to deal with pets, pronouncing difficult names, strategies for keeping up with forms, safety recommendations, etc. are all encouraged.				
Ask the trainer for clarification on the use of forms related to intake and referral if needed, as the trainer provides a very brief review of each one.	Active participation in brief review of forms as needed.			
For the trainer's approval, choose an example from your case files to place in your portfolio that demonstrates your competency in facilitating the movement of all appropriate clients/children and families through the intake and screening process. Include an example of each form (6.11a-k). Please protect the child and family's privacy by covering the identifying information.	Copies of forms (below) reviewed and approved as acceptable, at the discretion of the trainer, added to the portfolio:			
If necessary, and at the request of the trainer, meet for further instruction and review of procedures related to any form identified by the trainer as incomplete or inadequately completed. Following further instruction, resubmit to the trainer a newly completed and improved example demonstrating acceptable	6.11a Consent for Evaluation 6.11b Eligibility Documentation 6.11c Professional			

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completion of form(s) for approval and inclusion in the portfolio.	Verification of Current Diagnosis 6.11d Review of Pertinent Records 6.11e Family Assessment Summary 6.11f Local Education Agency Notification 6.11g Minimal Data 6.11h Central Intake 6.11i Informing & Consent for Early Intervention Services 6.11j Authorization for Procurement			
	and Release of Information			

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	6.11k Written			
	Prior Notice			
	(reviewed in			
	Module 4)			
6.12 Intake Field Observation	Omit unless			
	there is a			
Omit for experienced service coordinators.	concern.			
6.13 TEIS Overview	Awareness of			
	optional child			
If recommended by the trainer, review this	find and public			
PowerPoint outside of training. See note	awareness			
pages of PowerPoint for suggested dialogue.	tool.			
6.14 More Rules for the Road Intake &	Improvement in			
Referral Post-Test	number of			
	correct			
Complete the post-test. Compare your	responses			
performance with your results on the pre-test.	based on pre-			
	and post-test			
	results, to the			
	satisfaction of			
	the trainer.			
6.15 Building Resources	Active			
	participation in			
View PowerPoint Building Resources (slides	brief discussion			
1-5), engaging in brief discussion as directed.	as directed by			
	the trainer.			
6.16 Building Resources Web Assignment	Satisfactory			
	completion of			

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It is essential that service coordinators know how to access information and resources of use to families. This assignment will take time to do the appropriate research, and should be done outside of formal training time. Please complete this step: Visit the websites found on assignment sheet Building Resources Assignment of formal training time. Please complete these steps: 1. Visit the websites found on assignment sheet Building Resources Assignment 6.16a and update your knowledge of these state and federal programs. Steps 2-4 are voluntary for experienced service coordinators based on the requirement of the district/agency program coordinator/trainer. 2. Build a resource guide that you can refer to in your work. List each program, including the name, address, web address, phone number, contact person, and a very brief program summary or description. Your TEIS Directory of Services may be useful in gathering local contact information, where appropriate. 3. Place your information in a	research. Development of the research guide (to be included in the portfolio if completed) is voluntary for experienced service coordinators based on the requirement of the district/agency program coordinator/ trainer.			

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folder/notebook (or on index cards in a				
file box), and give to your				
trainer/supervisor for their approval.				
4. Place a copy of this information in your				
portfolio. If you choose to keep this information on index cards, a written				
statement of satisfactory completion of				
this activity can be placed in your				
portfolio by your trainer/supervisor.				
6.17 Building Resources in Everyday	Complete list of			
Routines, Settings, and Activities	ten specific			
	settings that			
Using worksheet 6.17, identify ten specific	are appropriate			
typical settings in your local area that serve to	for promoting			
promote the development and success of	the			
infants and toddlers. If you are serving	development of			
multiple counties, try to include examples from	infants and			·
each county. Upon completion, share this	toddlers,			
with your trainer/supervisor, and place a copy	county-specific			
in your portfolio.	if appropriate.			
6.18 Building Local Resources,	N/A			
Brochures, & Observations				<u> </u>
Omit assignment for experienced service				
coordinators.				

Additional	
comments:	